

Medicaid Administrative Claiming

Coordinator and Financial Officer Training
Summer 2011

What Is Medicaid Administrative Claiming?



MAC is a Federal Medicaid reimbursement available to schools for administrative activities associated with linking a child to appropriate Medicaid services.

Participation in MAC



- District or Cooperative <u>must participate</u> in the Direct Service Billing Program.
- Complete a Memorandum of Understanding (MOU) with the DPHHS.
- Complete a W-9 form.
- Prepare district participant listing each quarter.
- Participate in the RMS time study.
- Submit quarterly financial data relevant to Medicaid and staff expenditures.
- Certify local match

RMS Time Study



- Administered by MAC Coordinator
- Now online application thru WEBRMS*****
- Intended to quantify the amount of time that participants spend completing reimbursable administrative activities.
- Quick and unobtrusive
- Converted to statewide percentages & applied to the total costs of the identified participants for each school or co-op
- Performed during quarters 1, 2 & 4
 - Summer quarter (3) is an average of 3 previous quarters

Random Moment Observation Sampling Form

Montana - Medicaid Admin Claiming

For the period: 3-October-2005 to 23-December-2005

Your Name Here

Job Title School Name - Building

Sample Moment: Mon/00/2005

0:00



DEPARTMENT OF PUBLIC HEALTH AND **HUMAN SERVICES**

STATE OF MONTANA

Sample Sequence #: 0

Participant Signa	nture Date	
		ou need to sufficiently describe what you were doing at the date and time listed e do not use individually identifiable health information in your description.
What were you Who were you Why were you	with? Student Family/Parent	Colleague Self Other:
Section I: Job Title (Please select only one [x])		Section II: Activities (Please select only one [x])
01 02 03 04 05 06 07 08 09 10 11 12 13	Administrators for Special Education Audiologists and Audiology Assistant Bilingual Specialists Counselors Diagnosticians Dietitians Coordinators/Liaisons for Spec. Ed. Interpreters Licensed Nurses or School Health Aides Medicaid Billing Clerks Occupational Therapists and Assistants Orientation and Mobility Specialists Physical Therapists and Assistants Program and Staffing Specialists	01 Direct Medical and School Health-Related Services 02 Educational and Other Social Activities, Non-Medicaid 03 Outreach to Medicaid Programs 04 Outreach to Non-Medicaid Programs 05 Facilitating an Application for Medicaid 06 Facilitating an Application for Non-Medicaid Programs 07 Referral, Coordination and Monitoring of Medical Services 08 Referral, Coordination and Montry of Non-Medical Srvcs 09 Client Assistance to Access Medicaid Services 10 Client Assistance to Access Non-Medicaid Services 11 Prgm Planning, Devlpmt & Mntrg of Medicaid Services 12 Prgm Planning, Devlpmt & Mntrg of Non-Medicaid Services 13 General Administration 14 Not Scheduled to Work
15 16 17 18 19 20 21 22 Validate: False	Psychologists and Interns Recreation Therapists Registered Nurses Respiratory Therapists Social Workers Speech-language Pathologist and Aides Student Services Personnel Work-Study Coordinator	Instructions for Completing the Random Moment Sample Form 1. Check the name and job title at top left of the sample form. Make a note of the sample time. 2. After your sample moment, provide a brief answer to each of the three questions that accurately describes what you were doing at the date and time listed above. This description should sufficiently describe what you were doing to support the activity code you choose. 3. In Section I, (middle left of RMS form), select the box next to your job title. This should match the job title under your name. If the title is incorrect t under your name, cross it out, and write in the correct job title from the choices in Section I. 4. In Section II, (middle right of RMS form), select the box next to the activity code that matches your answers to the questions above. Use the definition of activity codes on the back of this sheet to help you choose the correct code. 5. If you need to make a correction, cross out the incorrect information. Circle, remark and initial the corrected information. White-out invalidates the form. 6. Sign, and date the form under your name (top left of form). Promptly return the form to your MAC Coordinator.
Julion orginaturo	2	Please use ink to complete this form.
	MAC Coordinator, or supervisor must in for accuracy, then sign and date.	DO NOT USE WHITEOUT

If "FALSE", do nothing.

RMS form reminders



- Participant signatures & date on or after the sample
- Need top questions filled out for every activity selected....even Activity 14—Not Scheduled to Work
- Mark Section 1---Job Title
- If temp. is hired—line thru the name on form and write in name of temp. and fill out the form. Make a note in the data entry portion of the RMS.
- Don't use white out----line out wrong information
- Only MAC coordinator or a supervisor can sign at the bottom for a TRUE validation, make a note on the data entry of the RMS form.
- What were you doing and why were you doing this needs to be more accurate. See examples.

What Is an Administrative Activity?



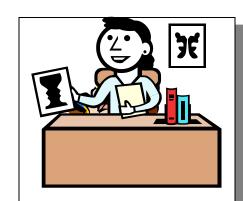
Administrative Activity

Direct Service

Administrative Activity



Refer a student for speech therapy



Provide Speech therapy



Participate in plan of care meeting

Time Study Participants



- Administrators for special education
- Audiologists and audiology assistants
- Bilingual specialists
- Counselors
- Diagnosticians
- Dietitians
- Home to school coordinators/liaisons for special education
- Interpreters
- Licensed practical nurses or school health aides
- Medicaid billing clerks
- Occupational therapists and assistants

- Orientation and mobility specialists
- Physical therapists and assistants
- Program and staffing specialists
 (including staff like mobility, behavioral and transportation paraprofessionals)
- Psychologists and interns
- Recreation therapist
- Registered nurses
- Respiratory therapists
- Social workers
- Speech-language pathologist and aides
- Student services personnel
- Work-study coordinator

Reimbursable Activities

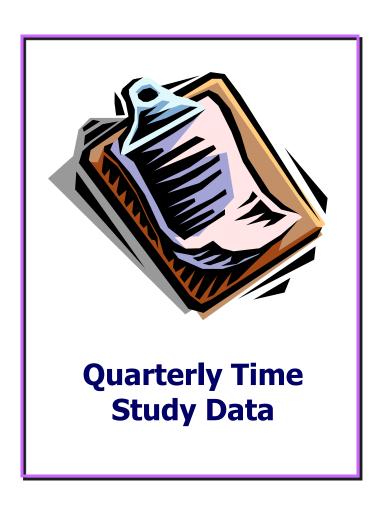


- Outreach to Medicaid programs
- Facilitating an application for Medicaid
- Referral, coordination and monitoring of Medicaid services
- Client assistance to access Medicaid services
- Program planning, policy development and interagency coordination related to Medicaid services
- General administrative activities
 - These are redistributed proportionately to the other activities



Components of Calculating a Claim/Invoice









Sample Templates





Financial Data



Participant List



Invoice

Financial Data Requirements



- Identify the fund and function codes for staff included on the Participant list
 - Identify and <u>exclude employees</u> who may be 100% funded by Federal funds
 - If jointly funded, they may be included in the sample pool and the appropriate portion (non-federal) of their salary, benefits and related expenditures should be reported for claiming purposes.
 - If adding additional Participants, please add at the bottom of the worksheet and not at the top. The pre-built formulas start on line 9 and lines added above will not be included in the formula.
 - No 3000 Function codes are used so don't add them and if more than one function code applies----add a duplicate line as formula reads only one function code per line.

Financial Data Requirements, cont.



- Expenditures are collected on a quarterly basis at the completion of each calendar quarter. All data should only pertain to the quarter in which it is actually expensed.
 - Cost elements should represent what your school district has expended in total and should reflect "all" functional district cost that support the Medicaid program, not just those costs applicable to the staff listed on your district's Participant Listing.
 - Remove all Federal dollars from reported costs
 - Don't forget to fill in the number of employees on Participant List in the box at top---if not I have to figure myself.
 - Amounts included on the worksheet should represent a full quarter of actual district-wide cost activity minus the salary and benefits for the staff included on the Participant Listing.
 - Use of estimated, budgeted or annual costs will not be accepted for claiming purposes.

Financial Data Template Salary and Benefits Tab 2



- Report the total salary and benefits for each position identified on the Participant List for that quarter insuring that the fund and function information is completed for each entry.
- Report salaries and benefits of support staff that were not sampled but who provide direct support to the staff on the Participant Listing
 - Direct support staff may or may not be on the Participant List
 - If not on the Participant List, include the salary and benefits for the support person in the direct support personnel salary and direct support personnel benefits columns in the Special Education Administrator's row.
- Participant List and Financial Salary & Benefits should match

Financial Data Template Cost Data Tab 3



- Report all operating expenditures applicable to district-wide operations at the fund and function level for expenditures that support the Medicaid program.
- Report expenditures for any of the following functions and objects for which employee costs may be charged for financial reporting purposes.
- If using a Fund code for a column, please remember to list it at the top....I still see a lot of forms with no Fund Code and yet dollars are reported underneath the blank column

Object Codes



- 1000 Instruction (function code)
 - 100 Personal Services Salaries (object code)
 - 200 Personal Services Employee Benefits
 - 300 Purchased Professional & Technical Services
 - 400 Purchased Property Services
 - 500 Other Purchased Services
 - 600 Materials and Supplies
 - 800 Other Expenditures

Please continue to report all "object codes" (100 – 800) as listed above for all applicable function codes listed below:

- 2100 2600 Support Services (all)
- 2700 All Other Functions (as necessary)

Function Codes



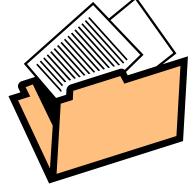
- Please remember that you only need to report costs for those functions that support the Medicaid program.
- These dollars should be divided by the following functions:
- Again...remember to use the appropriate one at the top
 - 01 General Fund
 - 10 Transportation
 - 13 Tuition
 - 14 Retirement
 - 15 Misc. Programs
 - 21 Comp Abs

- 24 Metal Mines Tax Reserve
- 25 State Mining Impact
- 28 Technology
- 29 Flexibility
- 82 Interlocal Agreement Funds

Audit File Requirements



- Any computations or allocation used in reimbursement calculation
- Copies of personnel listing, financial documentation, and invoice
- A detailed listing of all revenues offset from the claim, by source
- Copies of all training materials given to staff
- Names of attendees and instructors for the training session given for that quarter
- A copy of the remittance report
- A copy of the summary of RMS time study observation forms
- Organization charts, job descriptions or other documents establishing a supervisory relationship between participants and direct support personnel.



Participant List



- If you don't have a clean one to use, you can always use an old one just update the information and the cover sheet to the correct period/date.
- Please check with Payroll to make sure the participant you may want to add is not 100% Federally Funded.
- A partially Federally Funded person can participate, just need to break out the Federal Portion when reporting on the Financial Data form.
- When choosing Work Schedule's see last instruction tab and choose an actual schedule that fits closest...I have to convert everything to a schedule list.

Certification of Match



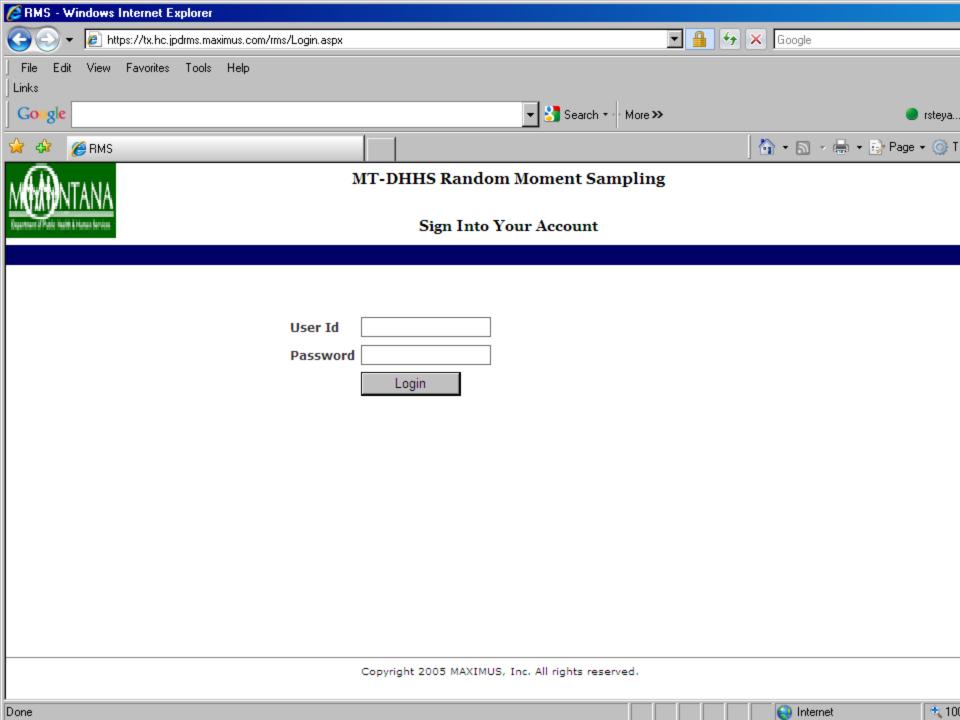
- Certification of Match is done quarterly on the invoice
 - Expenditure Requirements
 - Paid with local or state dollars
 - Can include both direct and indirect expenses
 - Expenditure Restrictions
 - Not Federal funds
 - Not IDEA dollars
 - Not Medicaid Reimbursement

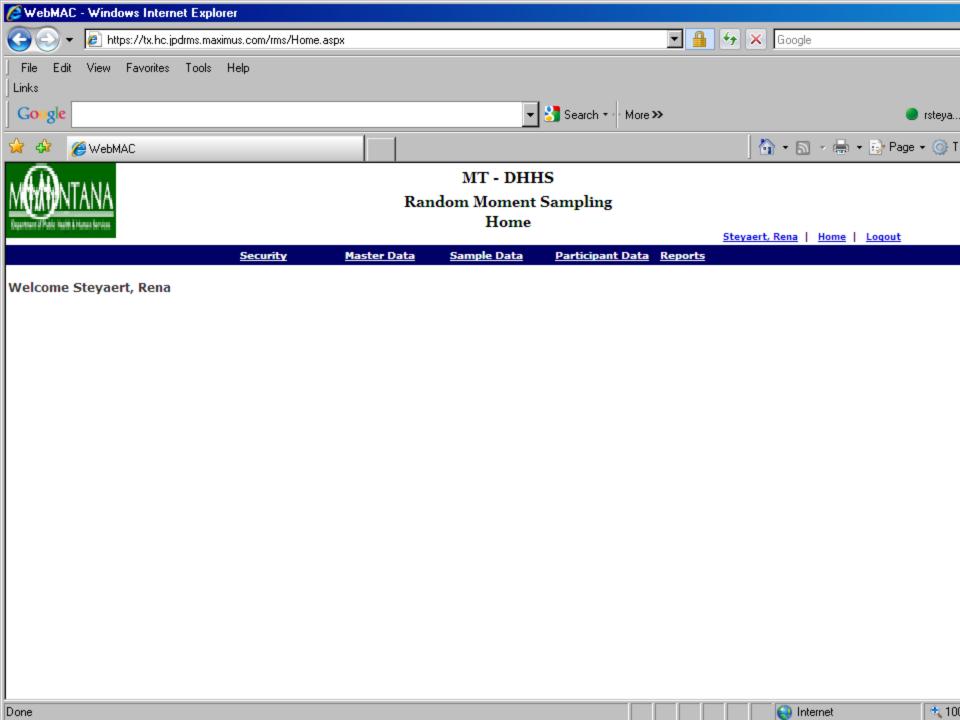


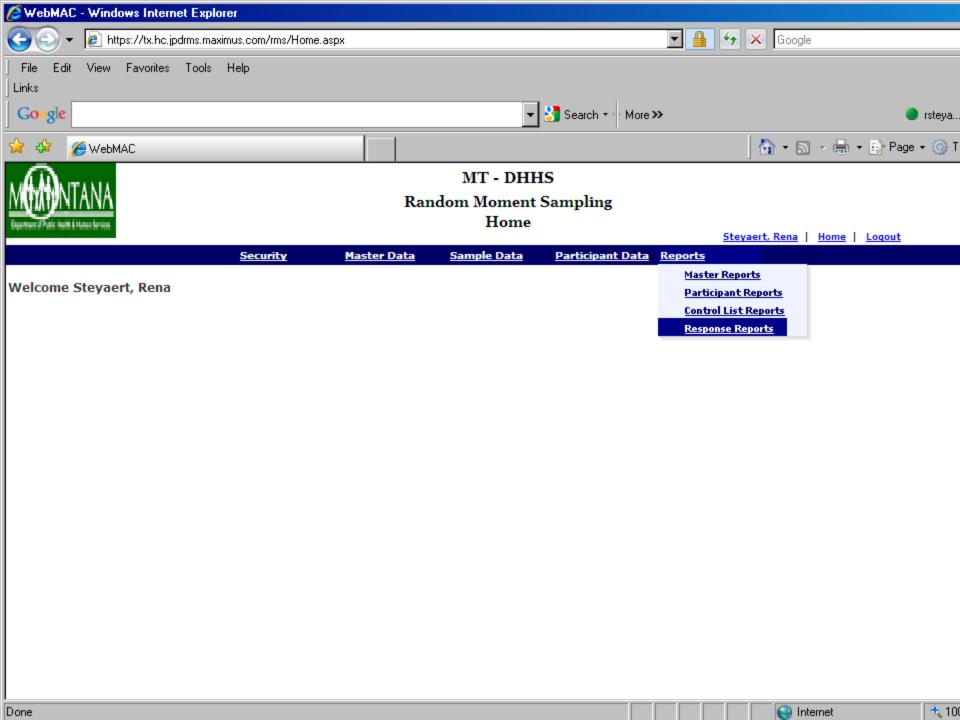
WebRMS new reporting version

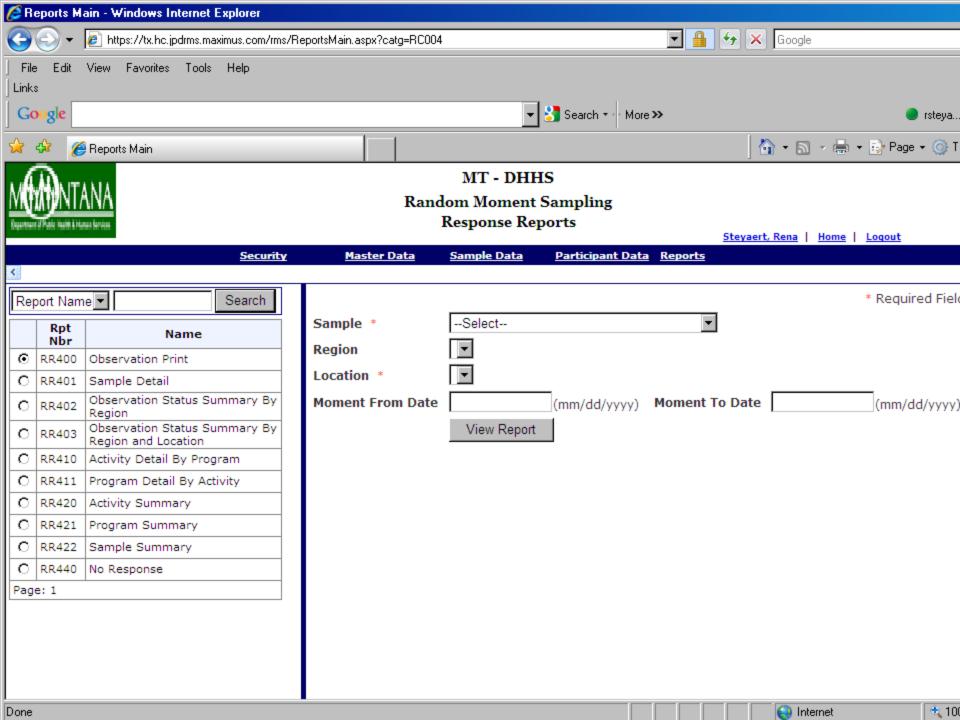


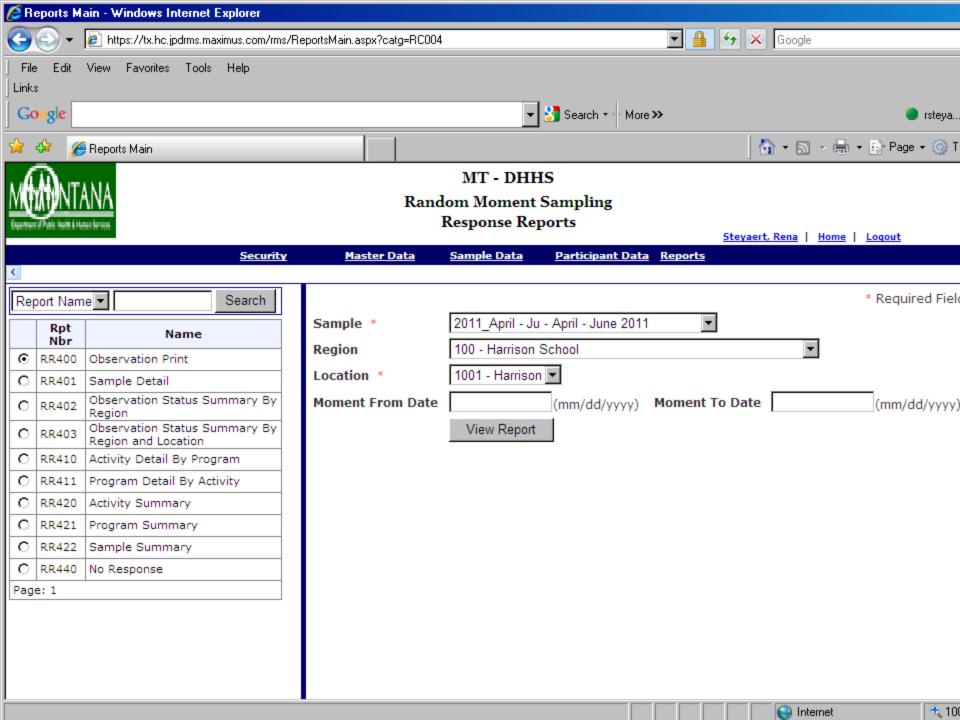
- MAC Coordinators will be responsible for data entry of activity per Random Moment Sample that gets generated.
- Coordinator will be given a password and user ID to log onto the Web page (I'll give you with a password) and find their own district or schools sample set to enter.
- Coordinator will have ability to print off all samples and distribute them and then enter data reported by participant. (3 new questions are added for 4th qtr)
- Paper copies of RMS forms will be kept by each district or school for audit purposed and 10 to 20% of the RMS forms may be requested by the state department for review.

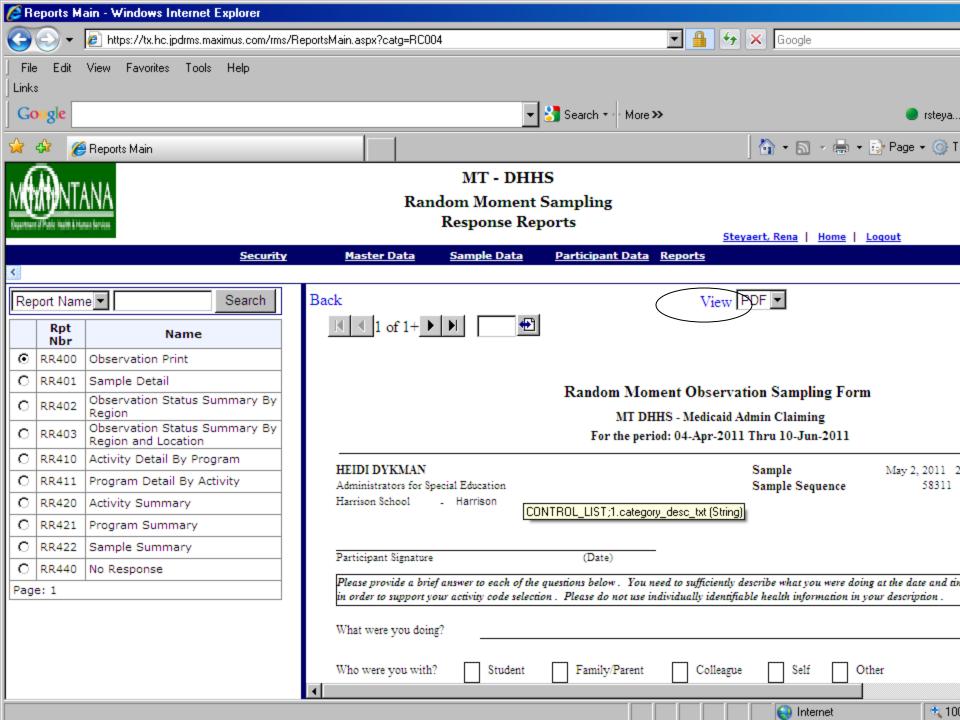










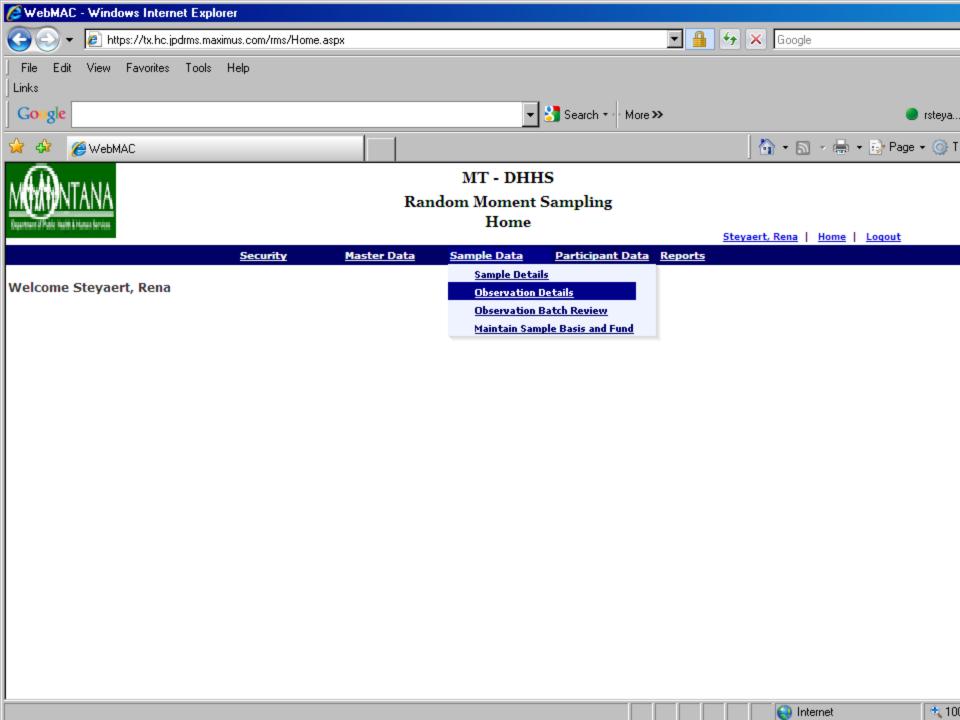


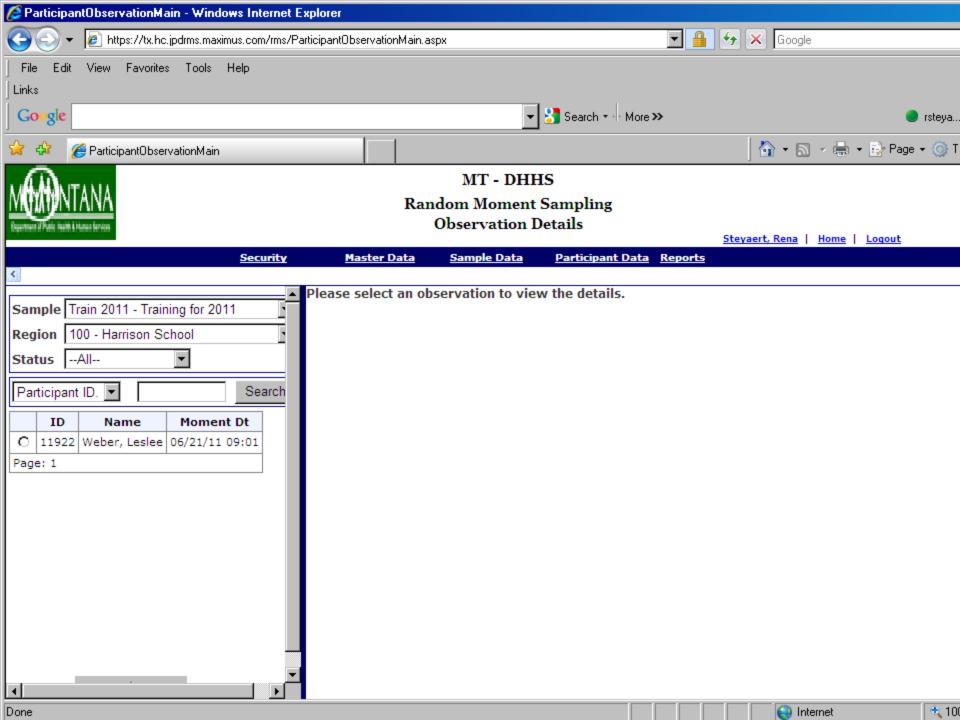
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	MT DHHS	nt Observation Sampling Form S - Medicaid Admin Claiming d: 04-Apr-2011 Thru 10-Jun-2011		
	HEIDI DYKMAN Administrators for Special Education Harrison School - Harrison	Sample May 2, 2011 2:19 pm Sample Sequence 58311		
	Participant Signature (Date)	-		
		u need to sufficiently describe what you were doing at the date and time listed above e individually identifiable health information in your description.		
	Who were you with? Student Family/Paren Why were you doing this?	nt Colleague Self Other		
F	Section I: Job Title (Please select only one 01 Administrators for Special Education 02 Audiologists and Audiology Assistant 03 Bilingual Specialists 04 Counselors 05 Diagnosticians 06 Dietitians 07 Coordinators/Liaisons for Spec. Ed. 08 Interpreters	Section II: Activities (Please select only one [x]): 01 Direct Medical and School Health-Related Services 02 Educational and Other Social Activities, Non-Medicaid 03 Outreach to Medicaid Programs 04 Outreach to Non-Medicaid Programs 05 Facilitating an Application for Medicaid 06 Facilitating an Application for Non-Medicaid Programs 07 Referral, Coordination and Monitoring of Medical Services		

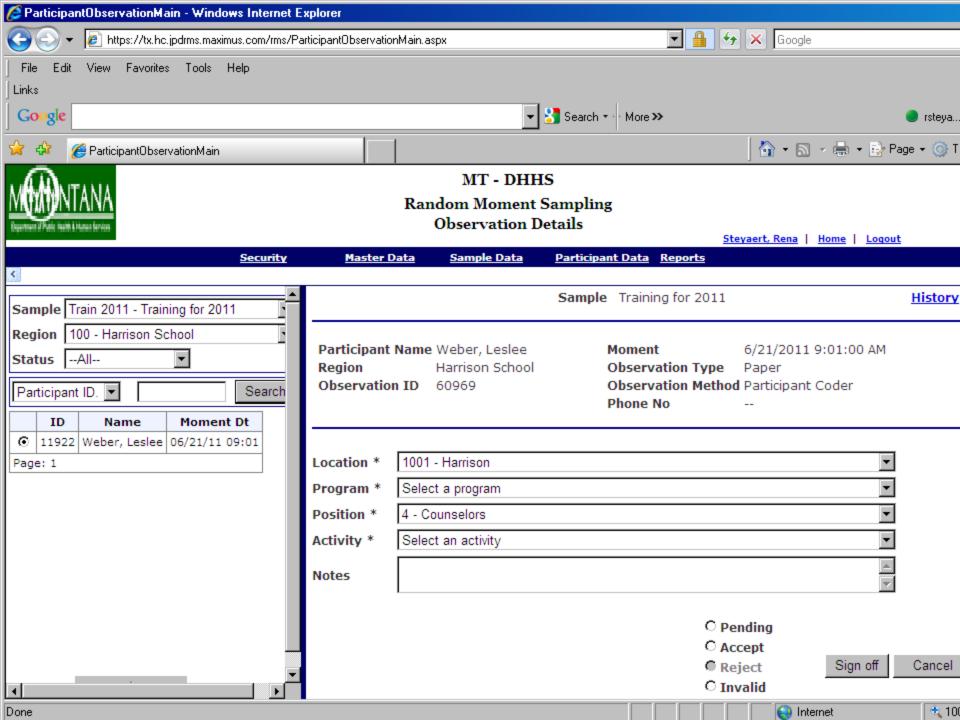
Great Falls PDF file transfer

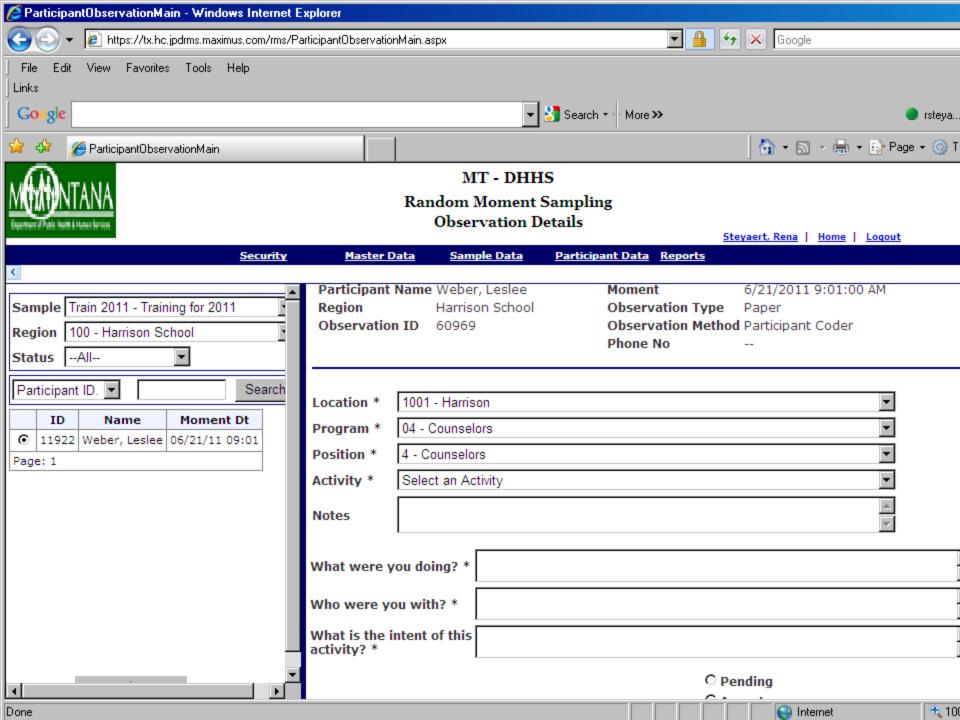


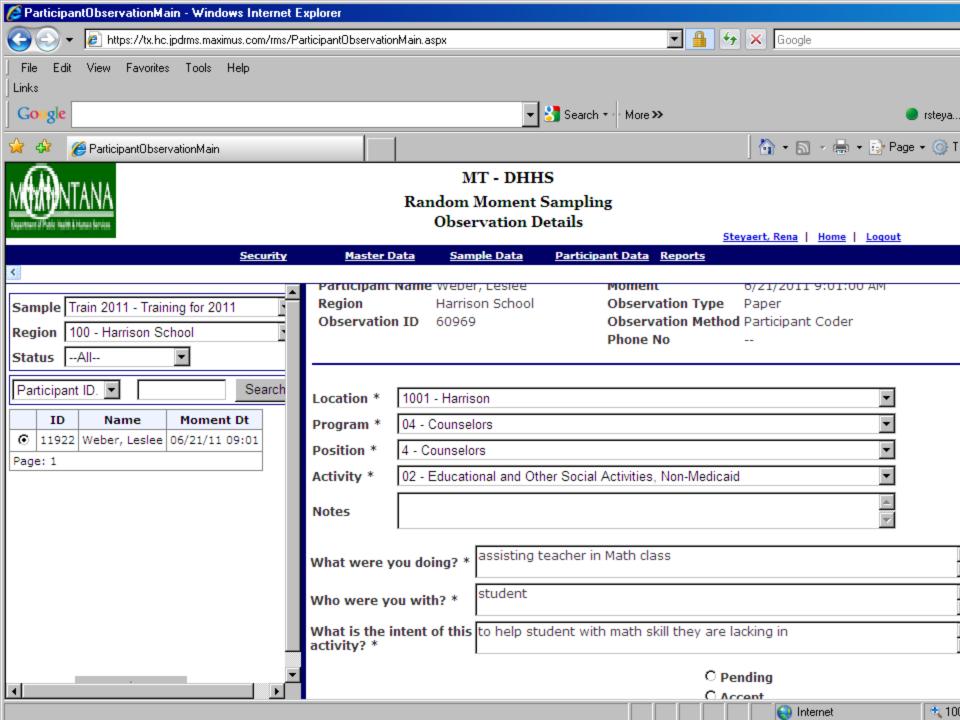
- Great Falls district has found a way to eliminate paper RMS forms to be distributed.
- They have turned the PDF document into an email to each participant and then the participant has the ability to complete the information electronically and save it.
- Jeanette Blatter can explain.











What If You Have Questions?



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Online Access



http://medicaidprovider.hhs.mt.gov

 Under "Resources by Provider Types", select "School-Based Services" then look for "Medicaid Administrative Claiming Program"

- MAC Financial Data Forms
- MAC Participant List Forms
- Manuals/Guides
- Training Presentation
- Definition of Activity Codes
- Training Quiz
- Medicaid Information

